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ABSTRACT

The paper describes a modified method of J. Mercer's System of Multicultural Pluralistic Assessment, in which only two factors (occupation and dwelling area) are used to assess socioeconomic status as a determiner of expected mean score on an IQ test. For validation, data by Mercer and the author are compared. (Author/SBH)

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TOWARD EQUALIZING EMH PLACEMENT FOR CHILDREN WITH CULTURAL DIFFERENCES-- AN ADAPTATION OF MERCER'S SYSTEM OF A MULTICULTURAL PLURALISTIC APPROACH TO THE DIAGNOSIS OF MENTAL RETARDATION

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ABSTRACT

Public Law 94-142 made it clear that no racial or cultural discriminatory procedures should be involved in the testing of handicapped children. The System of Multicultural Pluralistic Assessment developed by Mercer is a viable answer to testing intelligence of cultually different children. However, the system is too time consuming and the 9 sociocultural factors used in assessment are not readily available to the special education teacher. Thus, the author has developed a modified method of Mercer's system, in which only 2 factors (occupation and dwelling area) are used for fair assessment of intelligence of minority group children. For validation, data by Mercer and the author are compared.

Ever since Jensen (1971) raised anew the explosive issue of racial differences in intelligence, the realms of social, and natural sciences and humanities have been embroiled in the "nature or nurture" controversy of human intelligence. Aside from these complex problems of the geneticists' vs. the environmentalists' view of intelligence, the nature of the intelligence test itself has been once again brought into light.

During the past decade, a great deal of concern has been expressed over the inherent bias involved in intelligence testing, particularly when testing children with minority group backgrounds. This aspect of intelligence is especially vulnerable when diagnosing children with cultural differences (disadvantages) in relation to the existence of mental retardation. While the definition of mental retardation espoused by the American Association on Mental Deficiency takes the child's social adaptability into account, the actual practice of diagnosing mental retardation is, as Mercer (1971) and Prillman (1975) noted, to rely solely on the result of an individual intelligence test which is usually Wechsler type or the Stanford-Binet test.

Not surprisingly, policies regarding assessment of minority group children were challenged in the courts as early as 1954 (Brown vs. Board of Education) which opened up a new avenue of litigation for minority groups. One of the well-known cases was Diana vs. California State Board of Education, in which the plaintiff claimed that Mexican-American students from predominantly Spanish-speaking families had been improperly placed in classes for the mentally retarded because of low IQ scores. Although their mean IQ score was initially 63, a retesting by a bilingual psychologist gave them an IQ gain of 15 points (Goldberg, 1971). Thus, the plaintiffs charged that the testing procedure was discriminatory particularly in view of placing heavy emphasis on the child's English ability, not on Spanish ability. They also charged that placing these children in special education classes for the retarded was inappropriate.

A similar class action suit was filed in 1971 in Larry P vs. Riles for black elementary school children in California. The plaintiffs charged that they had been placed in special education classes for retarded children, mainly because of the low IQ scores they received on a middle class-oriented intelligence test. Consequently, the wrong placement resulted in stigmatization of the children who were labeled as mentally retarded (Friedman, 1973).

The two cases above are only representative of a score of similar litigations brought against, among others, the use of IQ tests for labeling minority group children as mentally retarded. This movement, in a sense, has forced legislators to stipulate the procedures as to testing handicapped children and has culminated in clear-cut deliniations of the testing procedure in the Education for All Handicapped Children Act (Public Law 94-142, 1975). PL 94-142 asserts:

> Procedures to assure the testing and evaluation materials and procedures utilized for the purpose of classification and placement of handicapped children will be selected and administered so as not to be racially or culturally discriminatory. Section 612, 5c. (Underlined by the author.)

In the meantime, some psychologists and special education teachers, particularly those with minority backgrounds, have expressed an opinion that a moratorium should be declared on all intelligence testing because of cultural bias involved. In fact some states such as California, and Washington D.C. and New York City have gone ahead banning the use of intelligence tests (Region 9 Task Group, 1977). It is evident that there is an urgent need for rectifying the current situation.

The System of Multicultural Pluralistic Assessment (SOMPA), developed by Jane R. Mercer who is the Chairperson of the Sociology Department at the University of California at Riverside, may be the most feasible method, at this point, to meet the need mentioned above.

SOMPA's principle is based on a philosophy that

> All tests (including intelligence tests and aptitude tests) are achievement tests which can be interpreted as measures of "aptitude" only when an individual's performance is being compared with others who (1) have had similar opportunities to learn the skills and information covered in that test, and (2) have been similarly motivated and rewarded for learning skills (Mercer, 1975, p. 142).

Needless to say, this is completely an opposite view of an intelligence theory which emphasizes genetic factors in determining the degree of human intelligence. This view, logically, leads to a position that specific norms for each ethnic group should be developed and used as a reference when determining an IQ for the child. During the 1972 to 1973 school year, Mercer and her associates administered the Wechsler Intelligence Scale for Children-Revised (IWSC-R) to 1924 children (616 Black, 620 Chicano/Latino, and 699 Anglo-American children), after interviewing the mothers of 2100 children (700 Black, 700 Chicano/Latino, and 700 Anglo-Americans, 5 through 11 years of age, Mercer, 1975, ibid). This sample of 1924 children from 3 ethnic groups provided the data for establishing norms for the SOMPA.

Based on a factor analysis of the data, Mercer identified socio-cultural modality factors essential for modifying the estimate of the child's intellectual potential. The 9 factors and their descriptions are as follows:

Factor 1: Family Structure (Scoring Range 0-3)
- i) Sex of household head
- ii) Marital status of mother
- iii) Child is living with both or one biological parent(s)

2: Anglization (Scoring Range 0-10)
- i) Highest grade completed by household head
- ii) By mother - highest grade completed
- iii) Household head reared in the U.S., or foreign country, or South
- iv) Mother reared in the U.S., or foreign country or South

3: Occupation of head (Used Duncan Socioeconomic Index) (Scoring Range 0-9)

4:
- i) Number of full brothers and sisters
- ii) Total number of persons living in the household

5: Parent-Child Relationship (Scoring Range 0-2)
- i) Biological relationship between child and father
- ii) Biological relationship between child and mother

6: Sense of Efficacy (Scoring Range 0-3)
  i) Locus of control and sense of powerlessness
7: Source of Income (Scoring Range 0-3)
  i) Household head provides most of the income
  ii) Ordinal ranking of financial support
8: Urbanization (Scoring Range 0-6)
  i) Size town in which father was reared
  ii) Size of town in which mother was reared
9: Community Participation (Scoring Range 0-6)
  i) How often the respondent participated in school meetings
  ii) How often the respondent participated in church meetings
  iii) How often she met with groups working for welfare
  iv) How often she participated in social affairs

(Mercer, ibid, pp 147-149, 1975)

Since the special education teacher is ordinarily not in a position to use the 9 sociocultural modality factors obtainable after an extensive interview, it is proposed here to use 2 factors which are readily available to a special education teacher.

The purpose of this modification is twofold: (1) to make this system more easily usable for the special education teacher and (2) to use this as a "Screening" instrument in order to make a decision that the child needs a thorough interview for a complete evaluation. In a sense, this modification resembles an abbreviated version of WISC (Simpson and Bridges, 1959, Enburg et al, 1961, and Silverstein, 1968).

The 2 factors every special education teacher has easy access to are: (1) occupation of head of the household and (2) area of dwelling. In addition, information regarding the size of the family and whether the family has a telephone is usually accessible. However, it was felt that the latter will overlap the first factor and the former may not be a reliable sociocultural factor because of other variables involved.

i) Occupation of the head of the household

A well-known social status rating scale developed by W. L. Warner (Warner, 1960) was used in a study by this author. The head of the household is defined here as the one who is mainly supporting the

family financially. If both parents have jobs, the higher status occupation will be used. Warner presented 2 ways of rating: the original scale and the revised scale. In this paper, the original scale was used as the major guidelines while the revised scale was used as a supplementary guidelines. This is because some of the ratings are obviously out of date. For example, according to the 1949 edition of the revised scale, miners were rated as the lowest manual workers. In 1978, this may not be true as far as their income is concerned and should, therefore, not be ranked in the same class as migrant workers and odd job men.

The original scale by Warner is as follows:

Occupation

7. Professional and proprietors of large business
6. Semi-professionals and smaller officials of large business
5. Clerks and kindred workers
4. Skiller workers
3. Proprietors of small business
2. Semi-skilled workers
1. *Unskilled workers (Warner, 1960, pp 123)

In a preliminary study, the author found that IQ's did not differentiate quite clearly among 7 categories when the original scale by Warner was used. Therefore, a 3 point scale was devised by combining 1 and 2 as category I, 3, 4, and 5 as category II, and 6 and 7 as category III.

ii) Dwelling Area

Since home addresses of children are easily found in files of children, it was decided to use the 2nd index of "dwelling area" rather than of "house type" which was also used by Warner.

The "dwelling area" indices given by Warner are as follows:

7. Very high; Gold Coast, North Shore, etc.
6. High; the better suburbs with spacious yards, etc.

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* The numerical order is reversed by this author.

5. Above average; areas all residential, larger than average space around houses; apartment areas in good condition, etc.
4. Average residential neighborhoods, no deterioration in the area
3. Below average; area not quite holding its own, beginning to deteriorate, business entering, etc.
2. Low; considerable deterioration, rundown and semi-slum
1.* Very low; slum (Warner, ibid, pp 123)

As before, the original 7 point scale was converted to a 3 point scale to meet the needs of this study.

In order to examine how these 2 factors of occupation and dwelling area are related to the intelligence factor, the author obtained information about children who fell into each of the 3 categories of the 2 factors. Then, those 2 factors were checked against the IQ of each child, establishing means and standard deviations for each of the three categories. As a rule, each child received an average of 2 factors, i.e., if the child was rated 2 on each factor, 2 was his score. If he received 3 and 2, then 2 points were assigned using the lower score.

It should be pointed out that first, the norms established in this preliminary investigation are tentative because of the small sample size and, secondly, data on IQ's are not uniform in that some were measured on WISC, some on the Stanford-Binet, and some on the Slosson Intelligence Test. Therefore, it is not claimed that the data represent a complete sampling of the general population in terms of IQ range, race representation, and social status.

Children's ages used in this study ranged from 6.0 years to 16 years and 11 months. The sample for lower IQ scores was obtained from students placed in special education classes for mentally retarded children. The sample for children with normal and high IQ's was obtained from the data this author has accumulated. The special education children sample contained black as well as white children. But no Chicano/Latino children at whose home Spanish was mainly spoken were included in the sample. The results are shown in Table 2.

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* The numerical order is reversed by this author.

Table 1

Data from Hisama Study (1978)

Sociocultural Modality	I	II	III
IQ	59.91	68.42	108.8
SD	5.44	14.19	15.78
N	48.	46.	45.

In comparison, Mercer data published in 1971 are shown in Table 2.

Table 2

Sociocultural Groupings and IQ for Mexican-American and Negro Children

Resemblance to Modal Sociocultural Configuration of the Community

	Most 5	4	3	2	Least 1-0	All Groups
Full scale WISC IQ	(n=24) (4.2%)	(n=174) (29.1%)	(n=126) (21.1%)	(n=146) (24.4%)	(n=127) (21.2%)	(n=598)
Mexican-American mean	104.4	95.5	89.0	88.1	84.5	90.4
Standard deviation	10.4	12.1	11.8	11.6	11.3	12.7
	(n=17) (5.0%)	(n=68) (20.0%)	(n=106) (31.3%)	(n=101 (29.8%)	(n=47) (13.9%)	(n=339)
Negro mean	99.5	95.5	92.8	87.1	82.7	90.5
Standard deviation	12.1	11.3	11.0	10.5	11.4	-

Source: Mercer, J. R. Institutionalized Anglocentrism: labeling mental retardates in the public schools. In P. Orleans and W. R. Ellis, (Eds.), Race, Change, and Urban Society, p. 333.

In general, the present data confirm the direction of the findings presented by Mercer, although the children of a lower socioeconomic status showed lower IQ's and those of a higher socioeconomic status showed higher IQ's. This was probably due to the fact that data of children for categories I and II were obtained from classes for EMH and a class for TMH children. Data for normal children may reflect the fact that most of the children's parents were university-related personnel and business men which placed them at either 6 or 7 on Warner's scale. It should be also emphasized that the norms presented in Table 2

are tentative in nature because of a possibility that a biased sampling, particularly for children in modality III, existed.

Based on the data and following Mercer's method, it is suggested that, if the special education teacher finds an EMH child coming from a family which clearly belongs to Category 1, as IQ of plus or minus one standard deviation, 5.44 points, from the mean of 59.91 is within the normal range for his socioeconomic group. The same statement can be made about the child who was rated as belonging to Category II. It is considered to be normal for his socioeconomic status if his score is within plus and minus standard deviation (14.19) away from the mean of 68.42. If, for example, a child, originating from a Category II family, scores an IQ between 82.61 and 54.21, he is considered to be within the "normal" range for his socioeconomic status. An IQ between 40.02 and 54.21 would be "low normal." According to Mercer's original guidelines, only if the child's IQ falls below 40.02 in the case of Category II, will he be considered subnormal because only the lowest 3% of the specific socioeconomic group is considered to be subnormal. Likewise, the score of an IQ between 82.61 and 96.80 would place him at the "high normal" range. Also, according to Mercer, an IQ above 96.80 shows that the child is extremely intellectually gifted for his socioeconomic group.

It has been attempted in the preceeding section, first, to bring forth issues involved in the nondiscriminatory assessment of children with cultural differences. Secondly, a most promising approach, Mercer's SOMPA, was expounded upon. Third, while Mercer's innovative approach is plausible, it is not quite practical for special education teachers whose major mission is classroom teaching. Hence, a simplified method of SOMPA was developed by the author.

The issues involved in the nondiscriminatory assessment are profound and complex. Thus far, no single method has come up with the magic words, "Open Sesame" and there never will be. It is hoped, however, that methods described here will at least light a path to the gate where a new horizon will emerge.

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